



OFFICE OF HUMAN RESOURCES


Isiah Leggett  
County Executive

Shawn Y. Stokes  
Director

MEMORANDUM

May 30, 2018

**TO:** Executive Branch Departments and Office Directors

**FROM:** Shawn Y. Stokes, Director  
Office of Human Resources 

**SUBJECT:** Requests for Individual Position Classification Studies (June Box) FY19

In accordance with MCPR§9-4 (b), the incumbent of a position, the incumbent's supervisor, or the incumbent's Department Director may request the Office of Human Resources to review the classification assignment of a position during the month of June. Effective June 1, 2018, the Office of Human Resources (OHR) will consider requests for an individual position classification studies. The Classification Review Request Form and required documentation must be sent electronically to [classification.ohr@montgomerycountymd.gov](mailto:classification.ohr@montgomerycountymd.gov) by 5 p.m. on Monday, July 2, 2018.

The following factors may indicate a need for a classification review:

- Significant and permanent changes in the assigned responsibilities
- Changes in the level of complexity/difficulty
- Changes in the nature of contacts with others
- Changes in the organizational impact of the position
- Changes in the level of supervision received and/or exercised
- Changes in the knowledge, skills, and abilities required to successfully perform in the position.

A classification review of a filled position requires an explanation of the changes in the position's responsibilities as well as an explanation of what occurred (e.g. reorganization or new mandates) that precipitated the change(s) in responsibilities. Classification reviews are not to be used to circumvent the recruitment process or merit programs. During this 30-day period, OHR will accept:

- A total of twenty-five (25) individual MCGEO OPT/SLT bargaining unit studies
- A total of twenty-five (25) individual unrepresented bargaining unit studies.
  - If accepted, the requesting department must pay the fee associated with the cost of the study.

Requests for Individual Position Classification Studies will be returned based on the following conditions:

- Failure to submit the required information
- Request was not submitted by the due date

- Position was last reviewed less than 36 months from the date of request
- Under the provisions of MCPR§9-4 (b) - 5 and/or UFCW Local 1994/MCGEO Bargaining Agreement Article 9 – 9.9

## HOW TO REQUEST AN INDIVIDUAL CLASSIFICATION STUDY REVIEW

To be considered for review, the party who submits a request for an individual position classification study must submit items 1-4 listed below. The information required assists in the review process and reduces potential delays with gathering information after the request has been submitted.

Prior to submitting an individual position classification study request, the incumbent of the position, the incumbent's supervisor, and the department director must cooperate to provide the below information regardless of which party submits the request for an Individual Position Classification study.

Before submitting a study request, the employee and/or supervisor should review existing class specifications (copies are available online) to determine which class best defines a majority of the duties performed by the position. The supervisor should compare the duties to the general class definitions and work examples of the different class levels in the appropriate series to identify the appropriate class level.

### Step 1: Complete Classification Review Request Form

The form should contain reason(s) for the classification review request, a summary of key changes to the position and any relevant background information. This form should be completed so a third-party reading this the form would be able to understand the rationale and justification of the request.

- Describe what prompted changes to the position and the request for a classification review. Provide any relevant background information which may have resulted in changes to this position (e.g., reorganization of department, consolidation of positions, new or significantly expanded program, etc.) If this position has assumed responsibilities from another position, please identify the other position/incumbent.
- Summarize the key changes in responsibility of the position; and how these changes altered the position in terms of: scope, complexity, impact to the department or County, decision making, authority/independence to act, consequence of error, types/amounts of resources managed, or required knowledge.
- If known, identify positions in your department that you view as comparable positions. In addition, if there are positions in other departments that you view as possible comparable positions, you may identify those positions as well (identifying positions in other departments is not required, however some departments choose to do so for certain positions).
- Provide any additional information that either justifies the classification review request or assists with understanding the position.

The form should be attached as the "cover letter" when submitting the study request along with the information below.

### Step 2: Position Description (PD)

The second step a position incumbent or incumbent's supervisor should take to have a position reviewed for proper classification is to ensure the current PD accurately describes the



duties and responsibilities of the position. If changes have occurred, a new PD should be developed. In addition, all changes which have occurred since the position was last classified should be documented.

If there is a discrepancy between what the position incumbent feels (s)he is doing and what management determines are the assigned duties of the position, every attempt should be made to resolve differences before the final PD is prepared. If no agreement can be reached, then the department director should submit an alternative description of the employee's duties and responsibilities to OHR with the request for an individual position classification study.

The position description must include:

1. Summary statement (major purpose of position and its role in the department)
2. Core functions and essential and marginal job duties
3. Degree of supervision indicating who assigns work, degree of independence and other guidelines
4. Requirements (skills, knowledge, ability, and behavioral competencies)
5. Signatures of the employee, immediate supervisor, department head/director on the position description
6. Date when the job description was approved or updated
7. Special Requirements (e.g., critical position, conflict of interest, licenses, certificates, credentials, etc.)

### **Step 3: Organization Chart**

A current organization chart of the position's department, showing the relationship of the position to its manager, subordinates, and peers. Organization charts allow reviewers to better understand the context of the position in the department and assist with ensuring equitable leveling of positions. In order to review positions more efficiently, we request that organization charts contain employee names, working titles, classification titles, and grade levels.

Any additional relevant organization charts, which aid in the review process (e.g., previous organizational chart in case of re-organization) should be included as well.

### **Step 4: Classification Review Funding Approval Form (unrepresented positions only)**

All unrepresented classification review requests must include a signed Classification Review Fund Approval Form signed by the Department Head/Director accepting all costs of the review if accepted.

### **Step 5: Prepare the Individual Classification Study Review Packet and Submit to OHR**

After the "Request for Classification Review Form" (Attachment A), position description (Attachment B), and related materials have been prepared and routed internally for necessary approvals, the HR Liaison or department designee will review the materials to ensure that 1) all items are correctly filled out and signed, and 2) the required attachments are included.

The request and appropriate materials are then forwarded to OHR via email to the following e-mail address: [classification.OHR@montgomerycountymd.gov](mailto:classification.OHR@montgomerycountymd.gov), with the subject line: **FY19 June Box Request: Dept Acronym – Position Number – Incumbent Last Name, First Name.**

Submit the following documentation to OHR:

- Completed Request for Classification Review Form
- Position Description. The PD must be signed and dated by the employee, supervisor, and the department head/director. Additional pages must be initialed and dated.

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- Organizational Chart
- Classification Study Funding Approval Form (for unrepresented requests.)

Upon receipt, OHR will review the requests for completeness, and notify the employee, supervisor, department head/director, and HR Liaison of acceptance or denial within 30 days of receipt.

If you have any questions regarding the Individual Position Classification Studies, please contact Phillip Daniels at [Phillip.Daniels@montgomerycountymd.gov](mailto:Phillip.Daniels@montgomerycountymd.gov).

cc: Department Human Resources Liaisons  
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Attachments